Submitting and Approving IDPs – Frequently Asked Questions

1.	I worked on my Plan some time ago. I can't remember if my supervisor is supposed to approve something or if I'm supposed to submit or approve something. How can I **check the Status of My Plan**?	**Checking the Status of Your Plan** • First of all, check to see if you've got a **Submit for Approval** button. If your plan has a **Submit for Approval** button, you made changes to your plan, but did not submit those changes, and you must click the **Submit for Approval** button to send those changes to your supervisor to approve. • If your plan has no **Submit for Approval** button, it's best to check your plan's status to see who should take the next action. Here's how: 1. Below the Plan Title in the **Plan Status** section, click the small blue triangle. Plan Title : FY09 IDP (Select Other Plan) Plan Status : Active/Approved (Expires 14 days from now) ▶ Effective Date: 10/1/2008 2. A small table will appear with the names and dates of approvals. The last person in the table with no action associated with their name is the person who must approve the plan. | Step No.	Action?	Name	Approved Date
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1	Submitted	Fallow, Kathy T	6/24/2009
2		Roleman, Amanda		 3. If your plan is in **Active/Approved** status and the message looks like this (see below), there is nothing more that needs to be done. All changes have been submitted and approved. Plan Status : Active/Approved (Expires 14 days from now) ▼ Effective Date: Changes, if any, made to this version of the 10/1/2008 Plan have not yet been submitted for approval.
2.	Is there a message that appears if my IDP plan needs to be approved?	1. Login to AgLearn. When you reach your AgLearn Personal Home Page, you should see a red alert message: **Alerts** ❗ You have a Plan that requires Review and Approval» 2. Click the message to move to the **My Plans** page. The plan that requires approval will have a Review button. Click the **Review** button. (Be patient, it may take a while for the entire screen to display). **Action** View Plan Review Notes 3. Click the **Approve** button

3.	I'm a supervisor. How can I tell if I have employee plans that need to be approved?	1. Login to AgLearn. When you reach your AgLearn Personal Home Page, you should see a red alert message: **Alerts** ⚠ You have Subordinate Plans that require Review and Approval» 2. Click the message to move to the **Pending Reviews and Approval s page**. The plan that requires approval will have a **Review** button. | User Name	Plan Title	Plan Period	Plan Status ▲	Effective Date	Approval Date	Expiration Date	Review Type	Action
0gtest, Vera	FY09 Plan		Active/Approved	10/1/2008		9/30/2009	Plan Revisi...	Review | 3. Click the **Review** button. (Be patient, it may take a while for the entire screen to display). 4. Click the **Approve** (or Reject) button. 5. Check the Status of the plan by clicking the **Plan Status** triangle (see above). The status should now indicate that no more changes are waiting for approval. Plan Status : Active/Approved (Expires 14 days from now) ▼ Effective Date: 10/1/2008 Changes, if any, made to this version of the Plan have not yet been submitted for approval.
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4.	When I look at my employees, I notice that one is listed as "Approvals Required", but I don't see any way to approve that employees plan.	It may be that the employee needs to approve something that you sent to them a while ago. Here's how to check: 1. Login to AgLearn and click the **My Employees** tab. 2. Click the **Subordinates** or **Organization Chart** menu. 3. Find the employee that has the "**Approvals Required**" message and click the **Goals** link. 4. Below the Plan Title in the Plan Status section, click the small blue triangle. Plan Title : FY09 IDP (Select Other Plan) Plan Status : Active/Approved (Expires 14 days from now) ▸ Effective Date: 10/1/2008 5. A small table will appear with the names and dates of approvals. The last person in the table with no action associated with their name is the person who must approve the plan. 	Step No.	Action?	Name	Approved Date
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2		Roleman, Amanda		
5.	I looked at my current plan and I see the message "**This plan contains changes that have not been approved**", but I don't see a **Submit for Approval** button. What does this message mean?	If there is no **Submit for Approval** button, it probably means that your supervisor has not yet approved the plan you submitted some time ago. To check who is responsible for the next action on your plan, do this: 1. Below the Plan Title in the **Plan Status** section, click the small blue triangle. Plan Title : FY09 IDP (Select Other Plan) Plan Status : Active/Approved (Expires 14 days from now) ▸ Effective Date: 10/1/2008 2. A small table will appear with the names and dates of approvals. The last person in the table with no action associated with their name is the person who must approve the plan. 	Step No.	Action?	Name	Approved Date
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1	Submitted	Fallow, Kathy T	6/24/2009
2		Roleman, Amanda		

| 6. | I checked the status of my plan and see that I sent it to the wrong supervisor. How do I get it back? | You'll need to update your AgLearn profile to the correct supervisor.

If your plan is in **Submit/Pending** status,

1. Login to AgLearn and click the **Personal** tab.
2. Click the **Profile** menu.
3. Scroll down to the **Supervisor** field and click the **Select** link.
4. Enter your current supervisor's first and last name.
5. Click **Search**.
6. In the Results list, locate your supervisor and click the corresponding **Select** link.
7. Click **Apply Changes**. Your IDP plan will now be in a **Rejected** Status.
8. Click the Career tab.
9. Click the **View Plan** button of your rejected plan.
10. Click **Submit for Approval** to send the plan to your current supervisor.

If your plan is in **Active Approved** status, complete steps 1-6 above, the do the following:

7. Click **Apply Changes**.
8. Click the **Career** tab.
9. Click the **View Plan** button of your current plan
10. When you make changes to this plan, you'll be able to submit the plan to the correct supervisor. |

7.	I have a plan in DRAFT status and can't submit it. I don't have a Submit for Approval button. My supervisor doesn't have any message to review or approve my plan. What can I do?	If you have a current plan that is in DRAFT status and cannot be submitted for approval, check the status of your other IDPs in AgLearn. Click the **Career** tab, and then click the **List All Plans** button. In a few seconds you'll see all the plans that you currently have in AgLearn. Check for these common errors:

1. If a previous year's plan has an expiration date that has already passed, and the plan is in **Draft** status, click the **Delete** button to remove this plan that was never submitted. Then check to see if your current plan can now be submitted.
2. If a previous year's plan has an expiration date that has already passed, and the plan is in **Expired** status, **but** has a **Review** button in the Action column, click the **Review** button and approve that plan. Then check to see if your current plan can now be submitted.
3. If a previous year's plan has an expiration date that has already passed, and the plan is in **Expired** status, **but** has no **Review** button in the Action column, click the **View Plan** button. Below the Plan Title in the **Plan Status** section, click the small blue triangle.

Plan Title :
FY09 IDP (Select Other Plan)

Plan Status :
Active/Approved (Expires 14 days from now) ▸

Effective Date:
10/1/2008

A small table will appear with the names and dates of approvals. If the last person in the table is your supervisor, your supervisor will need to login to AgLearn and review this plan. You should then be able to submit your current plan.

Step No.	Action?	Name	Approved Date
1	Submitted	Fallow, Kathy T	6/24/2009
2		Roleman, Amanda	

4. If a previous year's plan has an expiration date that has already passed, and the plan is in **Submit/Pending** status, you'll need to contact your AgLearn Agency Lead to have this unapproved plan deleted before you can submit your current plan. You can find contact information for all AgLearn leads by clicking the **Contact Us** link on the AgLearn Home Page at www.aglearn.usda.gov .

8.	I've checked all of the options in #7, but none of them apply to me. Can I ask the AgLearn Help Desk to help me?	Of course, but since the technician won't be able to check your IDP from the administrative side, you'll need to provide a way for the technician to troubleshoot the issue.

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1. Run a My Plan Report. From the **Reports** menu, select **My Plan**. Choose a **PDF** report format and click **Run Report**. All plans will be included in the report.

2. Save the PDF file on your computer.

3. Next, take a screen shot of your plans. Select the **Career** menu, and then click the **List all Plans** button on the right side of the screen.

4. Press **Ctrl-Print Screen** to save the screen.

5. Open a blank Word document and press **Ctrl-V** to paste the screen image into the Word document.

6. Save the Word document on your computer.

7. Create an email to AgLearnHelp@genphysics.com. State your problem and attach both the My Plan Report and the Word Document with the screen image. This will help the technician to see what you are seeing so that he can continue to troubleshoot the issue.